When to Contact Data Management

Issue: When to Contact Data Management

Resolution:

1) Refer to SOP: Claim Search CMS in the Customer Service Knowledge Base.
2) You will land on the Contract page
    a) Click on the **[Details]** tab.
    b) Check the status and expiration date of the contract.
3) If status is expired or void, reach out to Data Management in Microsoft Teams.
    a) Open Microsoft Teams and click on **[Teams]**
    b) Click on **[Data Management]**
    c) Provide the contract holders name, contract number, and status of the contract. Ask if the status is correct. - Follow hold procedures while waiting for a response.
4) Complete all necessary notes in CMS. Refer to SOP: Inputting Notes into CMS

Related References and Documents:

SOP: Claims Number Search in CMS

SOP: Inputting Notes into CMS

Author Date: 6/21/2023

SOP: When to Reach Out to Data Management

Purpose

This SOP is intended to outline when to reach out to Data Management. This applies to Month to Month (M2M) contracts only.

Teams Impacted

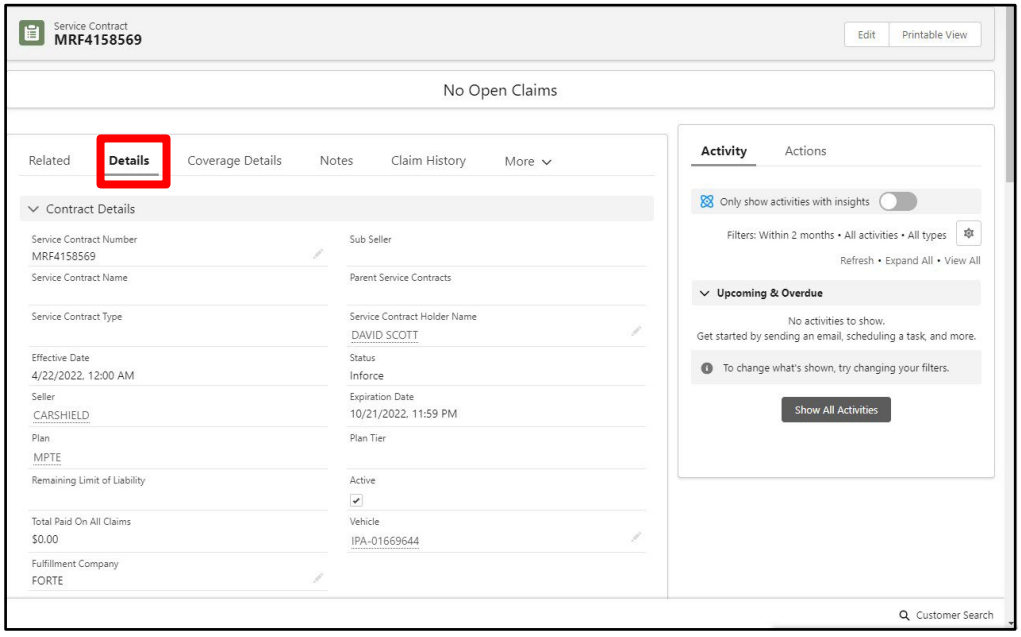
- All Departments

Procedure

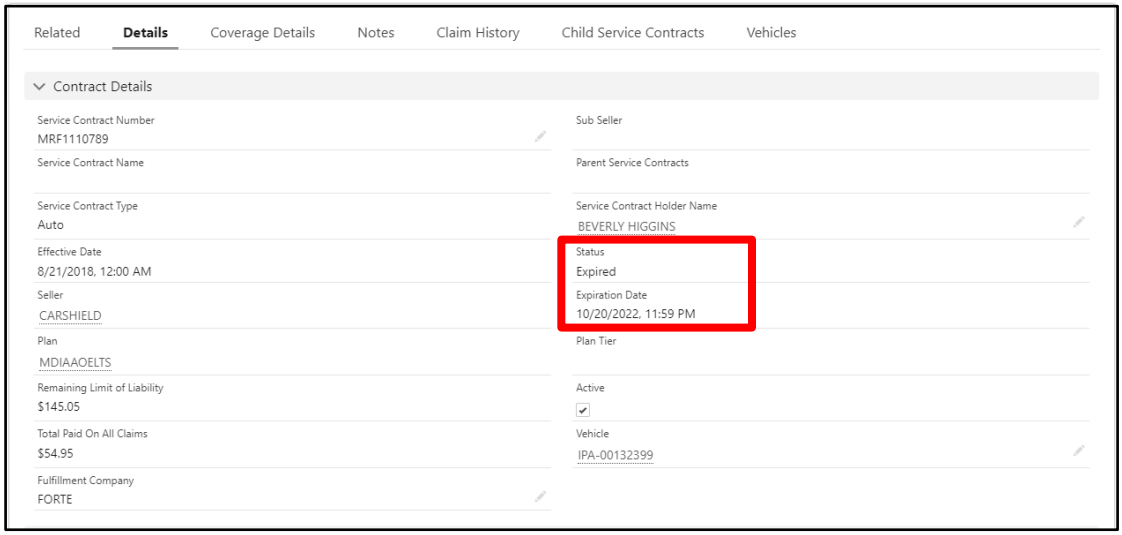
1. Refer to SOP: “Claim Search CMS” in the Customer Service Knowledge Base.

2. You will land on the Contract page.

   a. Click on the **Details** tab.

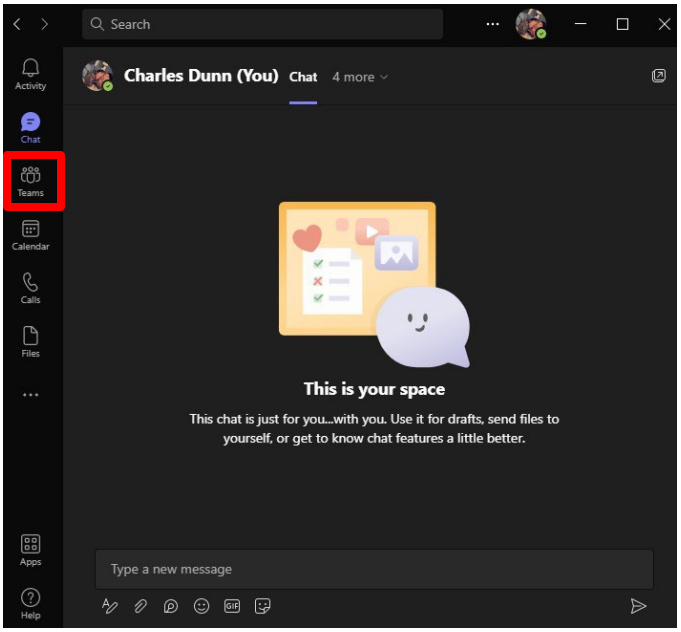


   b. Check the status and expiration date of the contract.

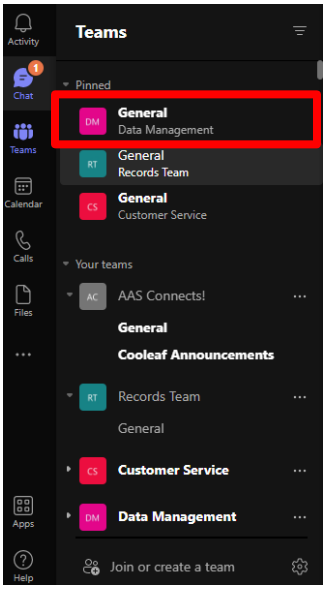


3. If status is expired or void, reach out to Data Management in Microsoft Teams.

   a. Click on **Teams**.



   b. Click on **Data Management**.



c. Provide the contract holders name, contract number, and status of the contract. Ask if the status is correct.

   Reminder: Be patient when waiting for a response. Remember to follow hold procedures while you are waiting on a reply.

4. Complete all necessary notes in CMS. Refer to Notating in CMS 20220301.

Approval & Revision

Date Created	Created By	Date Approved	Approved By
10/17/2022	Charles Dunn	11/08/2022	Felicia Mainiero / Brian Coleman

Date Revised	Revised by	Revision Description	Date Approved	Approved By
08/02/2023	Melissa Bryant	Added Fast Track Article	08/02/2023	Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]